REVISED Appendix B Functional Requirements
December 20, 2013
Request for Proposal Number 4544Z1

The Functional Requirements Traceability Matrix (RTM) is used to document and track the project requirements from the proposal through to testing to verify that the requirement has been completely fulfilled. The Contractor will be responsible for maintaining the set of Baseline Requirements directly related to the configuration of the EES. Additions, modifications, and deletions to these requirements will be added and modified throughout the project so it is imperative that a current version of the matrix be maintained at all times.

Bidders must provide an initial RTM as part of its proposal. The RTM shall follow the instructions below. The Bidder must state requirements exactly as they are provided in this RFP. The Bidder must indicate how it will achieve full compliance (i.e., requirement fulfilled 100%). Any requirements that the Bidder cannot attest to full compliance must be documented as outlined in Appendix D: Gap Analysis.

Bidders are required to provide a response, using the appropriate codes provided in the tables below, for each requirements listed in the Functional Requirements Response Matrix. Scoring for each requirement will directly relate to the Ability Code indicated by the Bidder.

Ability Code	Condition	Description
S	Standard Function	The proposed EES fully satisfies the requirement as stated. The Bidder must describe how the requirement is satisfied by the EES.
W	Workflow or System Configuration Required	Current functionality of the proposed EES exists in the EES and can be modified by a system administrator to meet this requirement. The Bidder must describe how the requirement will be satisfied.
M	Modification Required	The proposed EES requires a modification to existing functionality to meet this requirement which requires a source code modification. The EES will be modified to satisfy the requirements as stated or in a different format. The Bidder must describe the modifications. If the modification requires 1000 or more hours the Bidder must also complete Appendix D Gap Analysis.
F	Planned for Future Release	This functionality is planned for a future release. The Bidder must describe how the requirement will be satisfied by the EES and when the release will be available.
C	Custom Design and Development	The proposed EES requires new functionality to meet this requirement which requires a source code addition. The Bidder must describe the feature and its value. If the custom design and development requires 1000 or more hours the Bidder must also complete Appendix D Gap Analysis.
N	Cannot Meet Requirement	The proposed EES will not satisfy the requirement. The Bidder must explain why the requirement cannot be satisfied. The Bidder must complete Appendix D Gap Analysis.
O	Other Software	If the requirement is to be satisfied through the use of a separate software package(s), the Bidder must identify those package(s) and describe how the functionality is integrated into the base system.

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1.   General Requirements

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
GEN 001	The EES shall be branded using official State of Nebraska and Nebraska Department of Health and Human Services logos, images, etc.		
GEN 002	The EES shall provide customized local office information, through public-facing front-end (i.e. physical location of nearest local office, driving directions and name, email and phone number).		
GEN 003	The EES shall ensure alignment with HIPAA security, privacy and transaction standards		
GEN 004	The EES shall implement and support functionality to meet the requirements of the Affordable Care Act (ACA) and achieve compliance deadlines.		
GEN 005	The EES shall assure that all processes, user interfaces and documents produced by the system meet applicable State and federal accessibility standards for the life of the contract.		
GEN 006	The EES shall separate business rules from the application logic. Business rules will be contained in a COTS rules engine.		
GEN 007	The EES shall provide a scalable solution to allow for the incorporation of shared eligibility determination rules to support the State's phased approach.		
GEN 008	The EES will facilitate a "no wrong door" approach to insurance coverage as required in the ACA. The EES will accept account/application transfers to/from the Exchange to seamlessly facilitate eligibility determination for all Insurance Affordability Programs.		
GEN 009	The EES will allow applications and renewals via all ACA required media. E.G. Paper, online, phone, fax, in person and other commonly available electronic means.		
GEN 010	The EES shall leverage existing systems (where appropriate) and is built on system architecture that is scalable, flexible, modular and dynamic.		
GEN 011	The EES shall leverage connections to the federal data hub to access and verify data from participating agencies such as the IRS, federal DHHS, the Department and others. Hub – Required State - Required		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
	Financial Institutions- Future		
GEN 012	The EES shall achieve the necessary degree of interoperability between technology components to determine eligibility for Medicaid or CHIP or if the customer is not eligible for Medicaid a transfer to the FFM.		
GEN 013	The EES shall support a timed release schedule.		
GEN 014	The EES shall support all Nebraska DHHS Medicaid programs.		
GEN 015	The EES shall allow business users, as determined by the Department, to easily read/modify the eligibility determination rules.		
GEN 016	The EES shall support client facing services and documents in English and Spanish languages.		
GEN 017	The EES shall screen for language needs (LEP) at first point of contact		
GEN 018	The EES shall provide functionality to interface with Multi-channel Workforce Management software, such as Verint.		
GEN 019	The EES shall have the ability to schedule staff performing call center functions, back office functions, local office appointments, and be integrated with task manager.		
GEN 020	The EES shall have the ability to interface with the quality management system.		
GEN 021	The EES shall have the ability to interface with the LINKS Performance Management and Training System.		
GEN 022	The EES should have the ability to measure case review and customer service contact review. It should utilize a scorecard or similar tool to provide feedback down to staff level.		
GEN 023	The EES shall have the ability to interface with the NE Financial and Accounting system.		
GEN 024	The EES shall accommodate phone application voice signature mechanism.		
GEN 025	The EES shall validate and return address information errors as entered in the system.		
GEN 026	The EES shall provide functionality to allow applicants to provide a signature via all ACA required modes of application.		
GEN 027	The EES shall provide free-form narrative notes capabilities with no character limit, wrap-around text, sortable and searchable.		
GEN	The EES shall auto-populate notes based on predefined business rules.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
028			
GEN 029	The EES shall provide templates for notes entry.		
GEN 030	The EES shall provide mechanism to spell-check notes.		
GEN 031	The EES shall provide mechanism to associate notes to multiple beneficiary/households without retyping.		
GEN 032	The EES shall provide a mechanism to automatically date/time stamp all notes.		
GEN 033	The EES shall provide a mechanism for eligibility workers to edit their own notes with appropriate audit trails.		
GEN 034	The EES shall provide a mechanism for all system events, including system, user and administrative actions to be auditable.		
GEN 035	The EES shall provide a mechanism to restrict notes from being edited after the initial entry.		
GEN 036	The EES shall allow for any data element to be exported into an industry standard format.		
GEN 037	The EES shall allow applicant/beneficiaries to self-report changes in their personal information online, notify the appropriate eligibility worker based on parameters described by the Department when changes are made		
GEN 038	The EES shall re-determine eligibility when a Change of Circumstance is received electronically or entered by a worker.		
GEN 039	The EES shall provide the capability to view the new determination of eligibility after the change in information.		
GEN 040	The EES shall place an individual from one program into another, based on a Change of Circumstance or eligibility rules, without affecting other individuals in that household.		
GEN 041	The EES shall provide the capability to track and record any changes to an individual's information.		
GEN 042	The EES shall provide a mass change capability by a non-technical user to affect all or part of the Department caseload for any or all programs.		
GEN 043	The EES shall allow authorized users to update, add persons, and relationships to an existing household and maintain a history thereof.		
GEN 044	The EES shall close eligibility to a program without closing other programs associated with that household or individuals in the household.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
GEN 045	The EES shall change the status of any individual in a household without terminating eligible household members.		
GEN 046	The EES shall provide web-based functionality to allow the applicant to renew and initially apply for eligibility online.		
GEN 047	The EES shall allow for renewals via all ACA required modalities.		
GEN 048	The EES shall accept a renewal prior to the 12 month renewal date. The renewal period may vary by case/household/individual and program.		
GEN 049	The EES shall track and allow beneficiaries who did not return the pre-populated renewal form or the required documentation and are terminated on that basis a reconsideration period, as defined the Department, when the Department would reconsider eligibility without a new application and renew eligibility if necessary information is provided.		
GEN 050	The EES shall allow an individual who regains coverage during the reconsideration period, retroactive coverage back to date of termination.		
GEN 051	The EES shall automate the renewal process if all information remains the same or if verified information remains within applicable limits.		
GEN 052	The EES shall integrate with various systems within the State for the purpose of data sharing, eligibility determination and data verification (i.e. incarceration, Unemployment Insurance benefits, child support income, State wage information)		
GEN 053	The EES shall adjust eligibility determination resulting from appeal.		
GEN 054	The EES shall notify the applicant/beneficiary, electronically and via paper, of adjusted eligibility within 30 days of the adjustment, regardless of the reason for the eligibility adjustment.		
GEN 055	The EES shall track timeframes and deadlines of the appeal process and alert a worker or management of overdue status.		
GEN 056	The EES shall allow a worker to view appeal progress/status to report back to the applicant/beneficiary.		
GEN 057	The EES shall support an integrated and customizable applicant complaint and grievance process, with reporting capabilities.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
GEN 058	The EES shall be scalable and flexible enough to accommodate and adapt to changes required by State and/or federal statute, regulation, mandate, decision, or policy without significant changes to the architecture and without impacting the scalability or response times of the system.		
GEN 059	The EES shall incorporate the policy choices and priorities of the Nebraska policymakers.		
GEN 060	The EES shall meet the requirements of the RFP and be compliant with MITA 3.0 standards.		
GEN 061	The EES shall be based on an orientation of business processes, business rules and data and metadata management that allows modular componentized design approach that enhances interoperability across service modules and with external applications and data sources.		
GEN 062	The EES shall identify individuals who are dual eligible (Medicare plus federal Medicaid) and determine eligibility for dual-eligibles, as well as for those who are eligible for other Medicare savings programs.		
GEN 063	The EES shall support secure messaging between the Department and the federal data hub and/or the Connector via federally defined interfaces and Business Service Descriptions.		
GEN 064	The EES shall include workflow management based on whether an applicant is MAGI-based and/or MAGI-excepted households.		
GEN 065	The EES shall allow individuals in a household to be eligible under different categories and receive different benefits based upon individual information.		
GEN 066	The EES shall provide the capability to defined and stored DDHS specific data. The ability to use the data to drive workflow or pre-populate forms.		
GEN 067	The EES shall be scalable so that it can identify those applicants that are potentially eligible for express lane eligibility should the Department choose to adopt Express Lane Eligibility Program.		
GEN 068	The EES shall provide the capability for presumptive eligibility as defined by the Department and include provider web access for application purposes.		
GEN 069	The EES shall provide a mechanism to define required and optional fields, including default data values as applicable, based on program rules.		
GEN 070	The EES shall provide an alert system to notify workers when action items are assigned, have been completed, or are past due.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
GEN 071	The EES shall manually/automatically assign priority to alerts.		
GEN 072	The EES shall automatically escalate an alert if not addressed within the time limits.		
GEN 073	The EES shall provide mechanism for supervisors to be able to view alerts for any individual or group.		
GEN 074	The EES shall provide a mechanism to associate and tie alerts to household or applicant/beneficiary and have alerts accessible when household is reviewed.		
GEN 075	The EES shall automatically delete alerts when action is taken.		
GEN 076	The EES shall manually create, assign, update, change, and delete alerts.		
GEN 077	The EES shall automatically or manually archive alerts when the required action is completed.		
GEN 078	The EES shall provide a sortable and searchable history of alerts that display all actions taken in regards to that alert.		
GEN 079	The EES shall provide a mechanism to indicate that a beneficiary/household is under review.		
GEN 080	The EES shall provide a mechanism to alert management that pending applications have exceeded specified time limits.		
GEN 081	The EES shall create an alert of approaching deadlines.		
GEN 082	The EES shall create and assign alerts associated with pending tasks.		
GEN 083	The EES shall alert specified work units when specific beneficiary/household changes are made based on program rules (e.g. customer/beneficiary/eligibility worker changes the address, certain demographic information, etc.		
GEN 084	The EES shall not allow any duplication or potential duplication of services to the beneficiary.		
GEN 085	The EES shall provide the capability to alert eligibility worker of multiple households at same physical and/or mailing address.		
GEN 086	The EES shall maintain individual and household information.		

2. Reporting Requirements

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
RPT 001	The EES shall make available all business data elements for use with the business intelligence tool.		
RPT 002	The EES shall generate graphical representation of report data (e.g. pie charts, graphs, histograms, line plots, scatter plots)		
RPT 003	The EES shall generate all required Department and federal reports, in the format, media and schedule specified by the Department.		
RPT 004	The EES shall create 'canned' reports to be run on a scheduled basis. The schedule for each report should be easily changed through the system user interface by a non-IT worker.		
RPT 005	The EES shall retain report results in a manner that complies with Nebraska and applicable federal data retention policies, based on data type and program rules. The time period for which the reports are retained shall be mutually determined and shall be aligned with ongoing capacity planning exercise.		
RPT 006	The EES shall store all reports in such a manner as to allow online access to and retrieval of both current and historical reports via a user-friendly parameter and/or menu-driven access to reports, based on user permissions, as defined by the Department.		
RPT 007	The EES shall provide a mechanism to view online, save and print ad-hoc reports, based on user roles and program rules.		
RPT 008	The EES shall tabulate data by worker, county, region, etc.		
RPT 009	The EES shall provide a mechanism to perform a QC sampling by maintaining the current functionality for sampling methodology (regions, clusters, random, and stratification), including designating sampling size for random, designating month and year of a sample, designating regions and/or clusters (counties) of a sample.		
RPT 010	The EES shall provide a mechanism to create the universe from which the system pulls the samples.		
RPT 011	The EES shall provide a mechanism to manually eliminate a case from a sample and replace it with a replacement sample based on user roles. The EES shall capture a reason for eliminating/ replacing a case.		
RPT 012	The EES shall create, maintain and store QC review results for different program types, by office, sample month and year, sample ID.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
RPT 013	The EES shall define, implement, collect, and report using a set of business process-related performance metrics that conform to MITA defined performance metrics such as tracking changes in programs and policies and evaluating corresponding changes in health outcomes.		
RPT 014	The EES shall create case load reports such as active case list, active person list, pending application, review lists by manager, location, region and statewide.		
RPT 015	The EES shall provide multiple reports to include, but not limited to, fraud hearings, number and type of appeals decisions.		
RPT 016	The EES shall provide a dashboard summary view of the status of households across units for managers as for example, active, critical, error, quality assurance corrective action, QC reviews, pending reviews, etc.		
RPT 017	The EES shall provide a comprehensive reporting solution that will generate standard operating, pre-defined or operational reports without an adverse effect on system performance or response time.		
RPT 018	The EES shall generate standardized or ad-hoc reports without affecting worker response times.		
RPT 019	The EES shall store all reports in such a manner to allow online access to and retrieval of report information via a user-friendly parameter and/or menu-driven access to reports.		
RPT 020	The EES shall identify the date and time on all reports when it was generated and allow the worker to save the report multiple industry standard formats.		
RPT 021	The EES shall allow authorized workers to access, generate, and print reports.		
RPT 022	The EES shall save reports or raw data in multiple outputs formats (e.g. CSV, tab delimited, text, HTML, XML, XLS) in conformance to security standards and shall provide reports to be exported to an electronic file, PDF, Excel, Text, or Word format depending on the type of report.		
RPT 023	The EES shall maintain a history of documents and reports received, track these items and make them accessible in the electronic case file, so that information can be shared across programs and agencies using a HIPAA compliant method.		
RPT 024	The EES shall have standard reports to measure progress against the Department goals, initiatives, and policy changes, including, but not limited to, policy initiatives, budget initiatives, Affordable Care Act requirements, and grant opportunities.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
RPT 025	The EES shall generate ad-hoc and standard reports in real-time as well as historical.		
RPT 026	The EES shall provide summary tables of reports.		
RPT 027	The EES shall ensure that the reports are print-ready, visually acceptable to the user and provide the ability to format, set headers, labels.		
RPT 028	The EES shall be scalable to produce ad hoc reports on request without impacting system response times.		
RPT 029	The EES shall create reports using all current data elements available at the point of creation.		
RPT 030	The EES shall produce control and error reports from mass change processing.		
RPT 031	The EES shall have the capability to import data from other data sources.		
RPT 032	The EES shall support the ability to run online queries at the worker level.		
RPT 033	The EES shall produce reports on frequencies specified by the Department with the ability to change those frequencies at any time with minimal IT support.		
RPT 034	The EES shall allow users to sort, search, filter and drill down on any parameter of a standard report.		
RPT 035	The EES shall include version control for all reports.		
RPT 036	The EES shall generate data and reports needed to comply with federal audit and oversight requirements.		
RPT 037	The EES shall generate data and reports needed to apply for and demonstrate appropriate use of federal grant funding sources.		
RPT 038	The EES shall document the appropriate benefit programs, projects or other categories impacted by system or human actions to support claims for federal matching funds.		
RPT 039	The EES shall provide reports or data to support the cost allocation strategies (e.g., numbers and types of applications processed etc.).		
RPT 040	The EES shall differentiate funding source based on Department - specified criteria.		
RPT 041	The EES shall automate reports to support accurate forecasting of program costs.		
RPT 042	The EES shall automate reports to support evaluation of cost-containment and quality improvement initiatives		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
RPT 043	The EES shall create standard reports defined by the Department to compare program expenses to budgeted expenses for the State and federal fiscal year-to-date, prior State and federal fiscal year, and projected through the remainder of the State and federal fiscal year.		
RPT 044	The EES shall generate an inventory of current and available reports.		
RPT 045	The EES shall support the ability to produce formatted reports based on online queries.		
RPT 046	The EES shall provide access to Query builder application.		
RPT 047	The EES shall support the preparation of a branch report, i.e., standard template with pre-populated data.		

3. Business Requirements/Processes Requirements

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
OPS 001	The EES shall create easy, efficient, and accurate interfaces with other systems, including the federal data hub, state and other data sources to verify application information		
OPS 002	The EES shall support integrated eligibility system and/or reduce errors associated with processing eligibility for more complex populations		
OPS 003	The EES shall support workers to improve workflow and reduce errors including:		
OPS 004	• Computerized case files and online case histories		
OPS 005	• Automated assignments of case files to workers according to their expertise and availability		
OPS 006	• Logic flags		
OPS 007	• Online policy and procedure manuals		
OPS 008	• Integrated document imaging		
OPS 009	The EES shall contain the business rules and technical capability to determine online, real-time eligibility for Medicaid MAGI and non-MAGI based eligibility		
OPS 010	The EES shall automate eligibility verification including electronic acceptance of verification documents; validation of applicant data through electronic data exchanges with valid sources		
OPS 011	The EES shall centralize User Account Management, Authentication and Authorization		
OPS 012	The EES shall display and print stored or imaged forms		
OPS 013	The EES shall allow documents to be scanned into and associated with the electronic application/renewal individual, and/or household.		
OPS 014	The EES shall upload attachments to correspondence records.		
OPS 015	The EES shall link scanned images to correspondence and records to provide one view of all related material (images, letters, or contacts with		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
	staff), with multiple links.		
OPS 016	The EES shall provide the ability to view related correspondence records from a single correspondence record.		
OPS 017	The EES shall meet federal and State records retention and purging standards		
OPS 018	The EES shall provide a searchable library, with highly flexible search criteria to enable a user to quickly find needed information in policy manuals, policy memos, training material, implementation memos and all help functions without affecting work in progress.		
OPS 019	The EES shall support both task-based, individual-based, and household-based operations.		
OPS 020	The EES shall forward finished tasks to the next responsible party or parties, when multiple levels of effort are required for resolution.		
OPS 021	The EES shall save work in progress, exit the workflow, access work at a later point with all of the information still populated from the previous worker's actions so previous work will not need to be repeated and the worker can enter the workflow where they left off.		
OPS 022	The EES shall track, monitor, and display work done/ in queue to supervisors.		
OPS 023	The EES shall create and maintain eligibility worker availability information at the local office level.		
OPS 024	The EES shall monitor caseload size in real time and support an automated workload assignment process.		
OPS 025	The EES shall weigh caseloads and provide recommended distribution.		
OPS 026	The EES shall establish a flexible assigned workload management hierarchy that identifies the responsible organizational unit.		
OPS 027	The EES shall provide an automated and manual benefit card generation capability.		
OPS 028	The EES shall provide a mechanism to override automatic mailing of benefit card.		
OPS 029	The EES shall provide a mechanism to indicate a replacement benefit card is needed.		
OPS 030	The EES shall assign work using flexible criteria; for example, assign work by worker or the type of work..		
OPS 031	The EES shall transfer a single case, or a collection of cases in mass, including all electronic supporting documentation to and from any		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
	organizational unit.		
OPS 032	The EES shall automatically create a notification of a case transfer.		
OPS 033	The EES shall allow a worker to manually create a notification of case transfer.		
OPS 034	The EES shall evaluate a case prior to a transfer, prompt user if established transfer criteria are not met and not allow transfer until criteria is met.		
OPS 035	The EES shall allow user to override assignment rules and process a transfer when defined criteria are not met based on security rule and audit trail.		
OPS 036	The EES shall have the flexibility to assign a Single Point of Contact (SPOC) to a case or use a universal assignment.		
OPS 037	The EES shall identify if and when a SPOC is assigned to a case so all communications go through the SPOC.		
OPS 038	The EES shall update case and/or household members' information, based on user roles and business functions.		
OPS 039	The EES shall have a real time, comprehensive listing of workers per customer and/or case.		
OPS 040	The EES shall sort and display the type and number of cases assigned to a specific caseload.		
OPS 041	The EES shall add, subtract or modify the number of caseloads supported within the system.		
OPS 042	The EES shall assign a unique identifier to each caseload.		
OPS 043	The EES shall recommend transfer of cases from one caseload to another.		
OPS 044	The EES shall identify when a referral is required and automatically generate and track a referral.		
OPS 045	The EES shall allow and track manually generated referrals.		
OPS 046	The EES shall track status of referrals to monitor for required or expected action by the receiving entity.		
OPS 047	The EES shall provide the ability to differentiate types of referrals within programs. (e.g. Child only CSE referrals, ERU spousal elective share, TPL lead vs. change, HIPPS, subrogation)		
OPS	The EES shall identify when a Change referral is necessary (e.g.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
048	employment changes, household changes, entering or leaving foster care, etc.) and send the referral.		
OPS 049	~~The EES shall associate a consumer notice related to the specific Cost Avoidance and Recovery area (CSE, TPL, HIPPS, ERU, and Medical Subrogation).~~ The EES shall capture third party coverage information for applicable Medicaid clients and pass the third party payer information to the MMIS system for collection of TPL as appropriate.		
OPS 050	The EES shall identify, generate and send potential resource situations to work unit as specified. (e.g. Annuities, Trust like Devices, Spousal Elective Shares, Personal Injury cases, Workers Comp, etc.)		
OPS 051	The EES shall display a summary of case information by user role (e.g. head of household, members, relationships, addresses, date of birth, caseworker or process queue, office location, case status, recertification date, simplified report date, current benefit amount, sanction status, etc.).		
OPS 052	The EES shall provide a mechanism to provide custom views of case summary information, based on user roles, program rules, and office procedure.		
OPS 053	The EES shall match and merge duplicate case information, based on user role and program rules.		
OPS 054	The EES shall automatically update case information received through electronic access.		
OPS 055	The EES shall update and track reported changes which do not affect eligibility and do not require verification that are submitted electronically (e.g. phone number, cell number, e-mail address, change in income which remains below program threshold, etc.)		
OPS 056	The EES shall have the ability to close or deny a Category of Eligibility when business rules dictate.		
OPS 057	The EES shall close a Category of Eligibility without closing other active Category of Eligibility s associated with that case.		
OPS 058	The EES shall close any individual other than the program case name in a Category of Eligibility without closing the entire Category of Eligibility that has other active members.		
OPS 059	The EES shall provide a mechanism for authorized users to manually override a category of eligibility and/or allow opt-in/opt-out functionality within an active Category of Eligibility.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
OPS 060	The EES shall provide a mechanism to automatically change Category of Eligibility within an active program.		
OPS 061	The EES shall assign a new eligibility begin date for a new Category of Eligibility and automatically assign eligibility end date for a Category of Eligibility being closed.		
OPS 062	The EES shall provide a mechanism to release the hold after final disposition by the secondary reviewer.		
OPS 063	The EES shall share common data elements across multiple programs for selected fields.		
OPS 064	The EES shall have the capability to automatically reassign categories according to business rules.		
OPS 065	The EES shall apply specific eligibility rules during renewal, a reported change or processing simplified reporting for a program(s).		
OPS 066	The EES shall provide a mechanism to collect all information required to auto-populate all necessary Procuring Agency case processing forms, based on program rules.		

4. Eligibility Requirements

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 001	The EES shall support eligibility determination in keeping with federal "timeliness" guidelines and State performance standards.		
ELG 002	The EES shall support electronic verification of application data, using State or federal sources, where possible, and support post-enrollment verification where electronic data cannot be obtained.		
ELG 003	The EES shall use the CMS Single Streamlined Application or a modified version of the Single Streamlined Application.		
ELG 004	The EES shall support the use of supplemental application for initial eligibility determinations, renewals or changes to existing Medicaid clients.		
ELG 005	The EES shall electronically capture and store all data elements on the CMS Single Streamlined Application, even if the data elements are not needed for Medicaid eligibility determination.		
ELG 006	The EES shall support the use of alternative applications such as shorten form for non-MAGI, and assessment of resources.		
ELG 007	The EES shall support multiple non-MAGI specific programs, such as spousal impoverishment, Medicare buy-in program; etc.		
ELG 008	The EES shall maintain beneficiary eligibility data and information on each beneficiary's benefits.		
ELG 009	Where an existing case (account) exists, the EES shall reuse relevant information and/or selections		
ELG 010	The EES shall ensure seamless transfer of customers between the EES and the FFM as appropriate.		
ELG 011	The EES shall provide beneficiaries with periodic notifications by mail, e-mail, text, telephone and/or other format according to their stated preference for receiving such communications. The EES shall follow-up electronic notifications with paper notifications where required by federal rules or desired by State operations.		
ELG 012	The EES shall provide the capability to determine eligibility, and make changes to eligibility, on a retroactive basis as allowed by federal and State statuses and regulations		
ELG 013	The EES shall provide beneficiaries with clearly stated details as to rights and opportunity for appeal and grievance processes		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 014	The EES shall provide beneficiaries with clear information about privacy and confidentiality protections in the application process		
ELG 015	The EES shall provide beneficiaries with clear information about the Department's protocols in case of an information breach		
ELG 016	The EES shall integrate with the existing or replace a self-assessment tool to be used by external partners and customers to evaluate potential eligibility.		
ELG 017	The EES shall integrate with the existing or replace pre-application screening without entering any personal identifying information.		
ELG 018	The EES shall allow a customer to securely access an electronic account containing application information, notices and appeals information and Fair Hearing information.		
ELG 019	The EES shall use summarized household data for the pre-application process. (e.g. two adults with two children and estimated income).		
ELG 020	The EES shall apply eligibility rules to identify and flag potential financial and non-financial eligibility.		
ELG 021	The EES shall provide the customer information on eligibility and general verification requirements for Medicaid eligibility and timelines for applications and verification processes.		
ELG 022	The EES shall access educational materials on functions of Medicaid and on other state programs.		
ELG 023	The EES shall provide informational fact sheets on programs for which the customer is potentially eligible.		
ELG 024	The EES shall populate the online application with data entered in the pre-application screening tool, if a customer chooses to apply in the same session, where data elements are compatible.		
ELG 025	The EES shall track applications that originate from pre-application screening.		
ELG 026	The EES shall identify and flag expedited benefit cases, with user configurable triggers for expedited cases		
ELG 027	The EES shall use existing information on a known customer to preview the impact of potential changes via a new self-assessment.		
ELG 028	The EES shall assure consistency in eligibility determination processing when applicants attempt to access services through different entry points.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 029	The EES shall accept complete applications from the Marketplace electronically and make Medicaid eligibility determination without requiring additional information from the applicant consistent with the policies set in the State Plan Amendment.		
ELG 030	The EES shall specify beginning coverage date for those who know their existing employer coverage will be ending.		
ELG 031	The EES shall determine eligibility for all Medical Assistance programs.		
ELG 032	The EES shall validate all data fields for valid format (e.g. valid text, numbers, currency, dates, special characters allowed etc.)		
ELG 033	The EES shall upload, store and index verification documents such that they are tied to the appropriate case and searchable.		
EIG 034	The EES shall provide electronic signature capabilities for customers applying in a local office using an electronic signature pad.		
ELG 035	The EES shall provide an electronic signature for an application		
ELG 036	The EES shall record and store a telephonic signature for an application		
ELG 037	The EES shall provide the customer with a notification of approval or denial.		
ELG 038	The EES shall confirm for customers or workers that submitted applications are complete.		
ELG 039	The EES shall maintain data privacy and security requirements consistent with applicable laws.		
ELG 040	The EES shall retain completed applications with various retention schedules. All application data will be easily searchable and retrievable.		
ELG 041	The EES shall allow the customers to track their status via online or telephone during the application process.		
ELG 042	The EES shall store a version of the completed application form and allow the customer to retrieve it.		
ELG 043	The EES shall save and print a version of a completed application form that was saved online.		
ELG 044	The EES shall auto-populate known data within the system between modules, functions and applications within the life of the household.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 045	The EES shall process household with more than one applicant		
ELG 046	The EES shall refer cases with potentially fraudulent activity to appropriate agency		
ELG 047	The EES shall identify applications which are pending HUB Citizenship etc. verification		
ELG 048	The EES shall establish an eligibility base period from one to twelve months.		
ELG 049	The EES shall determine the correct eligibility base period automatically and manually.		
ELG 050	The EES shall retain a viewable history of changes to the eligibility base period.		
ELG 051	The EES shall place cases in a pending status if eligibility cannot be determined in real time due to system unavailability. The case will be flagged for follow up and verification of the required information		
ELG 052	The EES shall place cases in a pending status if eligibility cannot be determined in real time due to data inconsistencies in accordance with 155.315(f). The case will be flagged for follow up and verification of the required information		
ELG 053	The EES shall support multiple budgeting methodologies (e.g. perform multiple tests on a single household when family beneficiaries may be eligible for multiple programs).		
ELG 054	The EES shall identify all types of incomes (e.g. countable or exempt statuses of incomes, and resources by program or individual).		
ELG 055	The EES shall document case notes of actions which have occurred on case		
ELG 056	The EES shall calculate start and end dates of presumptive eligibility periods based on user configurable rules		
ELG 057	The EES shall create automatic and manual alerts to internal and external users upon the occurrence of specified events.		
ELG 058	The EES shall automatically re-determine eligibility for customers based on specified events (e.g. cost-of-living adjustment, changes in insurance premium amounts).		
ELG 059	The EES shall calculate customer responsibility/cost sharing for Long Term Care or Home and Community Based waiver programs.		
ELG 060	The EES shall determine applicant eligibility for specific non-independent living Long Term Care or waiver programs. (e.g. Institutional Living).		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 061	The EES shall set a period of ineligibility for a Long Term Care or waiver customer who commits a prohibited transfer of resources.		
ELG 062	The EES shall track movement from one facility to another to re-determine insurance eligibility, and cost sharing based on regulations. (e.g. hospitalization, nursing home, independent living).		
ELG 063	The EES shall identify resources excluded due to Long Term Care insurance.		
ELG 064	The EES shall complete and retain a resource assessment.		
ELG 065	The EES shall support the process of reviewing program eligibility.		
ELG 066	The EES shall display the basis of the eligibility budget calculations.		
ELG 067	The EES shall support varying methods of reviewing program eligibility (e.g. paper process where a review form is generated with pre-populated information).		
ELG 068	The EES shall trigger redetermination on cases with a fixed schedule of timed intervals.		
ELG 069	The EES shall track eligibility determinations separately. (e.g., income used to determine eligibility for Program 1 may be different than the income used to determine eligibility for Program2, etc.)		
ELG 070	The EES shall send notification of eligibility determination.		
ELG 071	The EES shall use the available interfaces to process redetermination for the MAGI qualifying population.		
ELG 072	The EES shall provide the capability to create and maintain an electronic household file of all applicants and families requesting services from the time that they first make an entry to the system.		
ELG 073	The EES shall support a range of disposition action triggers including event-based triggers (e.g., creation date, closing date, date of last review).		
ELG 074	The EES shall allow authorized users to review disposition actions prior to their execution.		
ELG 075	The EES shall allow users to apply disposition action holds on records.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 076	The EES shall have the flexibility to process individuals in the newly created categories.		
ELG 077	The EES shall provide a mechanism to generate a list of received and pending verifications including eligibility worker entered comments.		
ELG 078	The EES shall provide the ability to allow applicants to view, confirm, dispute and submit corrections to verification results.		
ELG 079	The EES shall provide applicants the ability to address inconsistencies reported by external entities (i.e. income, citizenship, etc.) within a timeframe defined by the Department.		
ELG 080	The EES shall update the applicant's record with the verification results as appropriate.		
ELG 081	The EES shall utilize master indexes to avoid duplicates.		
ELG 082	The EES shall search and match the existing client data before assigning new unique number (e.g., for example, search/match criteria could be the following, including but not limited to, "Fuzzy search", first name, last name, DOB, unique id, SSN, address, aliases, case number, etc.).		
ELG 083	The EES shall have the capability to reconcile duplicate records.		
ELG 084	The EES shall provide the data reports or file extracts to reconcile data between the EES and other systems.		
ELG 085	The EES shall capture alias information.		
ELG 086	The EES shall search account by multiple criteria (e.g., name, ID#, phone number, date of birth, county, assigned worker, etc.).		
ELG 087	The EES shall perform compound searches (e.g., names of married couple, names of parent and child, name of siblings, etc.).		
ELG 088	The EES shall easily modify list criteria while searching.		
ELG 089	The EES shall perform responsible person searches.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 090	The EES shall automatically identify a customer currently known to the system (e.g applicant pending determination, past member not currently enrolled, etc.)		
ELG 091	The EES shall electronically or manually assign a customer to a case.		
ELG 092	The EES shall conduct a manual case registration by a worker.		
ELG 093	The EES shall create a case by grouping associated customers together.		
ELG 094	The EES shall allow a worker to manually create a case.		
ELG 095	The EES shall use an existing case number per policy.		
ELG 096	The EES shall assign a unique case number to a case.		
ELG 097	The EES shall allow a customer to be associated to multiple cases at the same time. (e.g. customer may receive insurance products on one case number and be the case name for a different case number on which their child is receiving insurance products, etc.)		
ELG 098	The EES shall associate multiple cases to each other. (e.g. cases that share customers).		
ELG 199	The EES shall allow manually associate multiple cases to each other. (e.g. cases that share customers).		
ELG 100	The EES shall close beneficiaries/households/categories based on applicable eligibility rules resulting from changes in information and track closure reasons.		
ELG 101	The EES shall provide a process to override system closures.		
ELG 102	The EES shall provide functionality to manually close beneficiaries/households/categories based on applicable eligibility rules resulting from changes in information and track closure reasons.		
ELG 103	The EES shall allow the user to manually associate customers to each other.		
ELG 104	The EES shall create multiple cases based on regulations. (e.g. Disabled parent with a child).		
ELG 105	The EES shall manually separate cases per regulations.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 106	The EES shall automatically create a task for updates in the eligibility determination of insurance products/other public assistance programs (e.g., child turning 18, 21 or an adult turning 65, etc.).		
ELG 107	The EES shall provide Medicaid enrollment roster to Marketplace at stipulated frequency.		
ELG 108	The EES shall display or capture prior insurance requests.		
ELG 109	The EES shall set 'special situation' indicators based on rules maintained in the system. (e.g. language, confidentiality situations).		
ELG 110	The EES shall allow manually override all automatically set 'special situation' indicators.		
ELG 111	The EES shall provide the customer with a paper receipt of the documentation (e.g. paystub or birth certificate) that has been turned in to a worker.		
ELG 112	The EES shall have the capability for the Department to notify Marketplace of Medicaid Determination		
ELG 113	The EES shall provide a mechanism to manually extend verification timeframes.		
ELG 114	The EES shall point out missing data, errors and inconsistencies as they progress through the application, performing verification in real time where possible		
ELG 115	The EES shall provide a mechanism to have a "same as" selection to enter repetitive data.		
ELG 116	The EES shall allow a worker to jump back to sections previously completed without losing data entered.		
ELG 117	The EES shall provide a mechanism to manually navigate/skip to any screens that the worker is authorized to access.		
ELG 118	The EES shall identify and display verifications required for the applicant based on program rules.		
ELG 119	The EES shall produce a customized listing of verification documents for an eligibility criteria required to complete eligibility determination.		
ELG 120	The EES shall allow a worker to upload and attach source documents to support eligibility determination.		
ELG 121	The EES shall present worker with a summary view of the information entered prior to submission.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 122	The EES shall provide applicants the ability to submit alternative verification via multiple avenues (e.g., email, mail, phone, fax, walk- in).		
ELG 123	The EES shall assign a unique identifier as specified by the Department to be for each person entered.		
ELG 124	The EES shall allow an applicant or applicant's authorized representative to review the current application before and after formal submission with the appropriate safeguards and security measures.		
ELG 125	The EES shall not allow an applicant and applicant's authorized representative to submit more than one application within 30 days from the initial submission unless the application was denied.		
ELG 126	The EES shall allow an applicant or applicant's representative to amend an application as long as a determination has not been made.		
ELG 127	The EES shall allow the applicant or applicant's authorized representative to save and amend the application or renewal for up to 30 days in order to gather additional information prior to submittal.		
ELG 128	The EES shall allow and record an applicant's request to withdraw an application.		
ELG 129	The EES shall only collect applicant/household information once and share across Department designated fields.		
ELG 130	The EES shall provide an automated or guided application process to enable the worker to easily enter required information.		
ELG 131	The EES shall capture and track from which organization an application was submitted.		
ELG 132	The EES shall monitor the number of applications submitted and abandoned and the number of applicants who requested assistance via chat, telephonic, etc.		
ELG 133	The EES shall monitor and report on number of applications received and the method by which they were submitted.		
ELG 134	The EES shall capture interview dates.		
ELG 135	The EES shall provide system-generated date and time stamp for receipt of electronic applications to be used in monitoring standards of promptness by program.		
ELG 136	The EES shall provide system-generated date and time stamp for registration of paper applications.		
ELG 137	The EES shall provide a mechanism to begin benefits on a date different than the application date and system-generated date.		
ELG 138	The EES shall capture and display date that a disposition was made on an application/renewal.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 139	The EES shall check each incoming applicant against existing eligibility database to determine if the incoming applicant is new to the system, reopening a prior category, or adding applicants to existing household.		
ELG 140	The EES shall allow continuance of the application process for applicants without an SSN and assign pseudo-number and ensure pseudo number allows match to get correct SSN.		
ELG 141	The EES shall provide a mechanism to match and replace the pseudo-SSN with the actual SSN.		
ELG 142	The EES shall route applications to the appropriate staff, based on business rules.		
ELG 143	The EES shall display to the applicant discrepant information between the new application and information stored in the existing household.		
ELG 144	The EES shall provide a mechanism through which an applicant could check the applicant's status.		
ELG 145	The EES shall provide the ability to allow applicants to submit paper applications, whether through walk-in, fax or mail-in.		
ELG 146	The EES shall provide capability to track incomplete, new, add-on, and pending applications.		
ELG 147	The EES shall allow for a manual verification process when the Marketplace hub verification service is not available.		
ELG 148	The EES shall provide a mechanism to indicate which verification documents have already been provided.		
ELG 149	The EES shall send notification of alternative verification options to the applicant when electronic verification is not available.		
ELG 150	The EES shall provide the capability to determine and correct eligibility for current and prior months.		
ELG 151	The EES shall determine eligibility without worker intervention, as allowed by policy (e.g., exceeds the Medical Assistance income limit).		
ELG 152	The EES shall allow designated users to override eligibility determinations.		
ELG 153	The EES shall send eligibility determinations to the MMIS enrollment system on a real-time basis to support plan enrollment and claims processing functions.		
ELG 154	The EES shall generate reports related to eligibility decisions.		
ELG 155	The EES shall be flexible enough to add additional Medical Assistance programs.		
ELG 156	The EES shall display the eligibility results in a manner that is comprehensive and easy to understand.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
ELG 157	The EES shall have spenddown capability, including automating a spenddown of resources and income calculation.		
ELG 158	The EES shall allow the Department to set enrollment limits and provide a mechanism to manage applications for programs that are at whose enrollment is capped.		
ELG 159	The EES shall provide the capability for certain programs, as identified by the Department, to be flagged according to funding source.		
ELG 160	The EES shall evaluate the resource/asset eligibility of an applicant when determining eligibility for those programs requiring a resource / asset test.		
ELG 161	The EES shall allow authorized users to search online household files using key fields such as name, SSN, ID, date of birth, etc.		
ELG 162	The EES shall provide a mechanism for authorized users to access beneficiary/household summary from any screen.		
ELG 163	The EES shall provide the capability to re-open a category that is closed in the status it was before the closure.		
ELG 164	The EES shall provide a mechanism to indicate relationships between all members of a household.		
ELG 165	The EES shall provide a mechanism to automatically create the inverse family relationships (e.g., parent - child, child - parent, etc.).		
ELG 166	The EES shall provide the capability to perform mass terminations due to changes in status as well as program changes.		
ELG 167	The EES shall provide household-based activity checklists (to-do lists) to assist in prompting the workers in the completion of required household activities		
ELG 168	The EES shall allow for interview scheduling and tracking of completed interviews. Send client notification of interview is not completed.		
ELG 169	The EES shall include workflow management based on whether an applicant is MAGI-based and/or MAGI-excepted households.		
ELG 170	The EES shall identify all types of incomes (e.g. countable or exempt statuses of incomes, and resources by program or individual).		
ELG 171	The EES shall provide the capability at an individual level to be able to rework a prior case that is closed even if an open case exists.		
ELG 172	The EES shall track program requirements for individuals, e.g., those who are penalized due to transfer of assets.		
ELG 173	The EES shall provide an automated screening tool to determine potential eligibility status using predefined rules and to route to the next step in the process.		

5. Appeals Requirements

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
APP 001	The EES shall support an electronic appeals process, which includes transmission of data to the federal Hub, interfacing with document imaging, and a client web accessibility		
APP 002	If an Appeals decision is in favor of The Department, the EES shall automate the recovery of premiums or medical services that were paid and auto-generate form to Finance Office for recovery.		
APP 003	The EES shall capture and track the disposition of appeals (including status, assignments, and relevant household notes).		
APP 004	The EES shall record the detailed results and supporting documentation that result from or support an appeals decision.		
APP 005	The EES shall have the ability to be notified of results of Appeals		
APP 006	The EES shall automatically capture, retain, and display receipt of eligibility appeals.		
APP 007	The EES shall allow manually entered eligibility appeals.		
APP 008	The EES shall record the reporter/source (name, address, associated agency of person expressing the eligibility appeals, etc.), if applicable.		
APP 009	The EES shall provide a mechanism to generate a list of received and pending verifications including eligibility worker entered comments.		
APP 010	The EES shall assign a unique tracking number to the eligibility appeals.		
APP 011	The EES shall assign a worker, or group of workers, to manage eligibility appeals.		
APP 012	The EES shall update/change manager assigned to a eligibility appeal.		
APP 013	The EES shall identify and assign the priority of eligibility appeals.		
APP 014	The EES shall cross reference common eligibility appeals (e.g. receiving 100 fair appeals requests from a single customer on a single policy change).		
APP 015	The EES shall track when a request for reconsideration becomes an appeal request.		

REVISED Appendix B Functional Requirements
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Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
APP 016	The EES shall provide the facility to export and print case histories and case notes for the purposes of appeals.		
APP 017	The EES shall support the appeals process for customer exemption decision.		
APP 018	The EES shall accept and adjudicate customers appeals regarding eligibility determinations and exemptions from the customer responsibility requirement.		
APP 019	The EES shall associate the eligibility appeals to a case(s) and /or a customer(s).		
APP 020	The EES shall track all eligibility appeals.		
APP 021	The EES shall track multiple eligibility appeals from a single contact.		
APP 022	The EES shall store all eligibility appeals in a central location.		
APP 023	The EES shall track a request for reconsideration outside of standard case notes		
APP 024	The EES shall log updates to an appeal in case notes		
APP 025	The EES shall add notes to appeals		
APP 026	The EES shall capture history of eligibility appeals by multiple parameters (e.g. source, subject, date, etc.)		
APP 027	The EES shall sort history of eligibility appeals by multiple parameters (e.g. source, subject, date, etc.).		
APP 028	The EES shall document an audit trail which reflect who updated associated details to a case.		
APP 029	The EES shall provide the capability to record all decisions of appeals.		
APP 030	The EES shall alert appropriate staff when action is needed or information is due to ensure timely processing of the eligibility appeals.		
APP 031	The EES shall support an appeals process on individual exemption decisions from the individual responsibility requirement.		
APP 032	The EES shall provide the functionality to reinstate service coverage until the Administrative Appeals decision is rendered.		
APP 033	The EES shall provide the ability to allow applicants to view, confirm, dispute and submit corrections to verification results.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
APP 034	The EES shall have the ability for customers to request a postponement of an appeal if the request is made in compliance with State and federal guidelines.		
APP 035	~~The EES shall have the ability for the customers to request for reconsideration to handle inquiries.~~ The EES shall have the ability for customers to appeal an eligibility determination.		
APP 036	The EES shall have an appeal request submitted through multiple channels including phone, e-mail, letter, etc.		
APP 037	The EES shall provide an electronic template for eligibility appeal process.		
APP 038	The EES shall generate a referral to a third party assignee. (e.g. regular letter, email, automated referral, etc.).		
APP 039	The EES shall require a response by the third party assignee on a case by case basis.		
APP 040	The EES shall have the ability for customers to request an appeal in written form or verbally and followed up in writing.		
APP 041	The EES shall maintain health benefit plan at the current level after an appeal is requested by the customer on a timely manner until the decision of appeal is made (for a discontinuance of an active case).		
APP 042	The EES shall notify customer, third party entity, worker, etc. that the status of an eligibility appeal has changed. (e.g. pending hearing, withdraw, referred, etc.).		
APP 043	The EES shall notify applicants of failed verifications.		
APP 044	The EES shall notify the customer that their eligibility appeal has been received.		
APP 045	The EES shall notify the customer who their eligibility appeal has been referred to.		
APP 046	The EES shall provide a mechanism to track required verification timeframes.		
APP 047	The EES shall provide the capability to create an electronic household file that records all application data and organizes all supporting documentation and images in an easy-to-use format.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
APP 048	The EES shall allow all individuals to exercise their right to appeal any eligibility determination for Medicaid, premium tax credits, cost sharing subsidies, or QHP eligibility.		

6. Notifications Requirements

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
NOT 001	The EES shall generate notices by applicant/beneficiary preferred method of communication e.g., mail, email, or fax.		
NOT 002	The EES shall support multiple pages and applicant/beneficiaries standard "Rights and Responsibilities" text, including, but not limited to, applicant/beneficiary's right to an Administrative Appeal.		
NOT 003	The EES shall allow applicant/beneficiaries to choose the method of preferred communication.		
NOT 004	The EES shall record and track how correspondence was issued to the applicant/beneficiary.		
NOT 005	The EES shall provide the capability for mass notifications to applicant/beneficiaries or groups of applicant/beneficiaries.		
NOT 006	The EES shall auto-populate all forms with required information from the system (e.g., applicable dates, missing and provided verifications, notes, etc.).		
NOT 007	The EES shall not have page limits.		
NOT 008	The EES shall produce notices and forms in English and Spanish languages as required by the federal and State statutes, regulations, and policies.		
NOT 009	The EES shall issue notices at set timeframes according to program rules.		
NOT 010	The EES shall provide the capability to set and change release dates.		
NOT 011	The EES shall provide a mechanism to suppress and track any specific notice (one-time notice suppression).		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
NOT 012	The EES shall provide a mechanism to suspend any notice type.		
NOT 013	The EES shall provide a mechanism for designated persons to create new versions of notices/forms/correspondence from templates.		
NOT 014	The EES shall provide standard letter templates and the ability to add free form text to customize a letter to the customer's specific issue.		
NOT 015	The EES shall allow workers to generate or regenerate a notice/form upon demand.		
NOT 016	The EES shall generate a notice which includes a list of needed actions by the applicant/beneficiary by a standard due date (with a worker override), depending on the status or type of program applied for.		
NOT 017	The EES shall notify the beneficiary when their enrollment status has changed based on pre-set parameters so that the appropriate notice is generated for the circumstance.		
NOT 018	The EES shall provide the capability to electronically generate notices to obtain missing information.		
NOT 019	The EES shall create a sortable history of all notices associated with the applicant/beneficiary, including specific dates, and have the ability to view notices.		
NOT 020	The EES shall provide the capability to bundle and send out multiple notices and/or send out notices with corresponding forms together.		
NOT 021	The EES shall provide the capability to change information in a notice or delete a notice if it has not been 'sent'.		
NOT 022	The EES shall identify whether notice was auto-generated or worker-generated.		
NOT 023	The EES shall have noticing tightly integrated with the Marketplace and complying with all ACA regulations for such integration.		
NOT 024	The EES shall send electronic and/or paper renewal notices to beneficiaries.		
NOT 025	The EES shall pre-populate electronic and/or paper renewal forms with beneficiary information that is currently on file and allow the beneficiary to change or add information.		
NOT 026	The EES shall renew eligibility based on current federal and State statutes and regulations. The system shall be modified as required to meet all federal and State statues that are changed during the life of the contract.		
NOT 027	The EES shall track and provide notification to users when a renewal is due.		

Req #	Requirement Description	Bidder Ability Code	Proposed Solution/Comments
NOT 028	The EES shall track which electronic and/or paper renewals have been sent and which have been returned,		
NOT 029	The EES shall allow workers to generate notices, compliant with State and federal regulations at the time of notice generation, throughout the appeal process.		
NOT 030	The EES shall accept automated and manual responses received on referrals sent and associate them with initial referral.		
NOT 031	The EES shall retain history of all referrals sent and responses received.		
NOT 032	The EES shall store a copy of notices. These notices shall be available to the work units that support these functions (CSE, TPL, HIPPS, ERU, and Medical Subrogation).		
NOT 033	The EES shall generate Notice to customer that the full application must be completed to continue coverage beyond the presumptive eligibility period.		